

Corporate Giving Overview BIOCOM - November 2007

Nancy Jamison
Executive Director
San Diego Grantmakers
www.sdgrantmakers.org

Why we are here...

- Inspire and support greater and more effective corporate philanthropy and volunteerism in San Diego, in order to sustain the nonprofits that provide critical services in our community.
- To spread the word that corporate giving and volunteering is good business.

The Big Picture

- **Corporate Social Responsibility CSR**
- **Corporate Citizenship**
- Community Relations
- Community Engagement
- Community Involvement
- Corporate Accountability
- Community Investment
- Corporate Social Opportunity Innovation
- Sustainability
- Triple Bottom Line

Why and how companies give

- San Diego Business Journal Corporate Philanthropy Supplement
- A project with Volunteer San Diego
- May 2007

Community Engagement

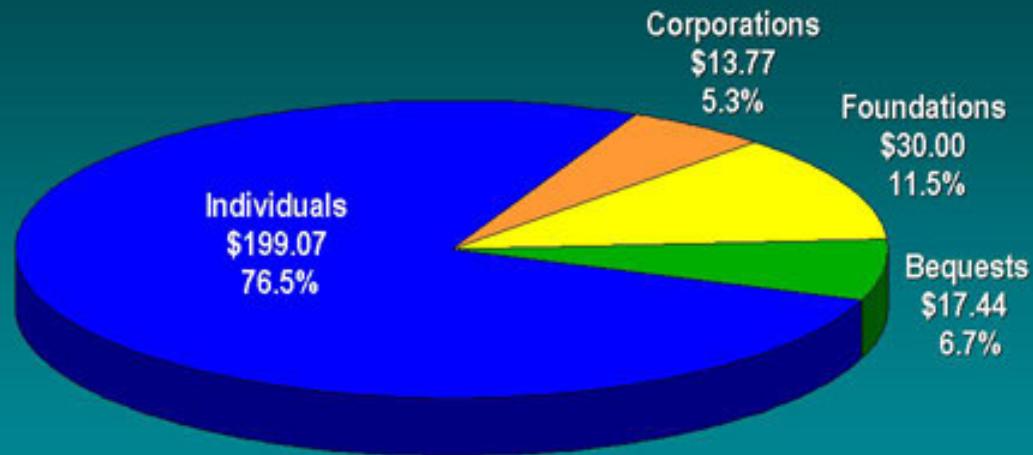
- Direct cash grants/gifts to nonprofits
- Sponsorships of fundraising events
- In kind donations of product/services
- Workplace/employee giving programs
- Loans of employee talent
- Employee volunteer programs
- Partnerships with nonprofits/causes

San Diego Grantmakers

- Regional association of grantmakers
 - ◆ 90 members – foundations, corporations, other
- **OUR MISSION:** To connect, educate, develop and inspire a diverse group of foundations and corporations to stimulate effective philanthropy in the San Diego region.
- **OUR VISION:** A vibrant, effective and growing philanthropic community that improves the quality of life in the San Diego region.

National Sources of Contributions

2005 CONTRIBUTIONS: \$260.28 BILLION BY SOURCE OF CONTRIBUTION



Source: Giving USA Foundation™ / Giving USA 2006

Corporate Giving Forms

- **Corporate Giving Program:** a grantmaking program established and administered within a profit-making company. Gifts or grants go directly to charitable organizations from the corporation.
- **Corporate Foundations:** usually started with a single gift that can become the endowment, which may be added to on an annual basis or if profits allow. A separate legal entity.
- **Donor Advised Fund at Community Foundation:** funds given to be granted on behalf of the company

Reasons to Give

- Change from checkbook charity to strategic giving that impacts business goals
- Attract/retain employees
- Customer loyalty
- Brand recognition
- Leadership development for employees
- Stronger community in which to do business

Components of a Successful Program

- Leadership Involvement
- Employee Involvement
- Focused
- Measurable
- Organized, staffed appropriately
- Integrated with other efforts
- Internal champion

Focusing your giving

- Where do company's interests and community needs intersect?
- Geography
- Giving area/category: health, arts, education, economic development, etc
- Employee/Leadership interests
- Customer interests/needs

Giving budget

- Percentage of pre tax net income
- Past experience adjusted for profitability
- Employee matching
- Marketing, PR, HR Budget

Cash Contributions

- Unrestricted grants to a charity
- Restricted/program grants
- Capital grants – building, endowment

- Employee matching gifts
- Dollars for doers
- Challenge grants

Non Cash Contributions

- In Kind
- Loaned Talent
- Employee Engagement

Managing A Giving Program

- Contact/Champion
- Who Decides
- Involving Others
- Written Guidelines and Requirements
- Application Procedures
- Document, record keeping
- Monitor, Evaluate Impact

Communicate Your Giving

- To employees
- To community and leaders/influencers
- To the customers/clients/vendors

A Few SDG Projects of Interest

- Another SDBJ Corporate Philanthropy Supplement
- Upcoming SD Metropolitan Magazine article
- SD Regional Giving Study with USD - 2008
- Collaborations/Working Groups –7
 - ◆ Workforce Funders Collaborative
- SD Fires 2007 – Coordinated Philanthropic Response